



## **Arboricultural report**

### **Client**

Pamela Hill

### **Site name**

53 Winchester Road, Chandlers Ford, Eastleigh, Hampshire,  
SO53 2GF

### **Arboriculturist**

#### **Miss Amelia Williams**

(MICFOR, CENV, M.ARBOR.A, BSC (HONS), CERT ED.F.E, DIP ARB L6 (ABC), CERT ARB L4 (ABC)

### **Date of the report**

9th November 2022

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## Contact Details of the arboricultural consultant

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## 1 Introduction

The site of 53 Winchester Road is a domestic residential-detached dwelling with a front and rear garden set back from the road. The Oak tree is located within the front garden of the property and is the subject of a Tree Preservation Order (TPO) under the jurisdiction of Eastleigh Borough Council. The owners of the tree have noticed a decline in the overall health of the Oak tree and wanted a tree survey carried out.

## 2 Scope of works

The Client has requested arboricultural services with regard to the site of 53 Winchester Road, Chandlers Ford and instructed the Arboricultural Company Limited to carry out the following services:

1. To attend the site and carry out a health and safety tree survey of one Oak tree.
2. To produce a tree survey schedule, and a tree survey plan and include this within a tree report produced in a PDF format.
3. To make any necessary tree works applications based on the recommendations from the tree survey.

### 3 Document disclosure

No documentation was provided at the instruction stage but the reference was made to the Oak tree being under a Tree Preservation Order and being in decline.

### 4 Site description

The Oak tree (Figure 1) is located within the front garden of 53 Winchester Road in Chandlers Ford and is located right on the edge of the driveway entrance and adjacent to the public pavement and adjacent to Winchester Road. The property is set to the West downslope from the Oak tree but within falling distance and the canopy extends over the driveway and parking area.

To the East of the main trunk is a wooden boundary fence which runs parallel to Winchester Road. The public pavement footpath runs parallel to Winchester road and goes directly underneath the canopy of the Oak tree to the East as does Winchester Road. There is a bus stop on the opposite side of the road which is also within falling distance of the Oak tree.

The entrance gate to the driveway is 1.3 metres from the main trunk and there is an area of block paving within the front driveway area within the potential rooting area of the Oak tree in addition to the tarmac driveway and parking area in front of the property.

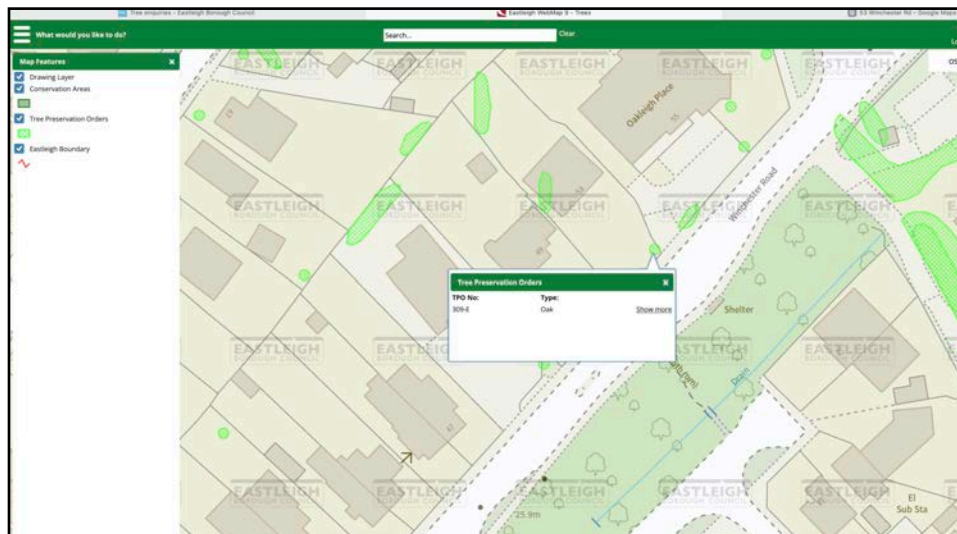
There are underground services within the potential rooting area of the Oak tree including drains within Winchester road and a drain across the driveway entrance. There are also overhead cables and services through the crown with a telegraph pole to the East of the main trunk.

**Figure 1: Oak tree in November 2022 viewed from the West within the property driveway**



The Oak tree is protected by a Tree Preservation Order and an extract of this from Eastleigh Borough Council website is in Figure 2.

**Figure 2: Extract from Eastleigh Borough Council TPO mapping showing the location of the TPO on the Oak tree**



The majority of the canopy of the Oak tree to the East and South East extends over the road of Winchester Road as shown in Figure 3 and the bus stop is actively in use throughout the day also. Therefore the target area around the tree is very high with moderate impact potential and potential for failure of dead or declining branches.

**Figure 3: View of the Oak tree from the South on Winchester Road**



## 5 Tree survey

A tree survey was carried out on the 3rd of November 2022 and the Client was present on-site at the time of the tree survey. The tree survey was based on an observational assessment from the ground level of one Oak tree within the front garden of 53 Winchester Road and did not include any other trees on the site.

The weather at the time of the tree survey was light rain and slightly overcast. The tree survey data collected was recorded on Ezytreev Tree Management software, the full tree survey and plan are in Appendix A and the tree survey guidance is in Appendix B.

The Oak tree has a maximum height of 24 metres at the highest point with an overall crown height of around 20 metres. The crown spread is 8 metres to the North, 12 metres to the East, 12 metres to the South and 9 metres to the West. The Oak is a mature tree with a stem diameter of 103cm and a girth of 324cm. The vigour is low and the tree overall is in fair condition.

There is bark damage around the lower trunk on the main stem, potentially old impact wounds during the historic construction work on the site. There is bark loss and the edges of the wounds are occluding on the wounds to the North West and West (Figures 4a, 4b and 5). There is bat potential due to open old pruning wounds creating small cavities, holes and crevices on the main trunk and at branch ends (Figure 6). Some of the cavities are wet while others are dry and mainly created as a result of old pruning wounds.

**Figure 4a & 4b: Bark damage to North East of the main trunk**



**Figure 5: Bark damage to the South West of main trunk**



**Figure 6: Cavities and holes and branch stubs**



The Oak tree is starting to naturally retrench and there are old branch stubs from previous tree works within the crown. The crown is in decline with major and minor dead wood and branches throughout the crown, particularly to the East, West and North and there are saprophytic fungi on the dead cut branch stub on the lower trunk to the West. The crown is sparse in places with the branch tips dying back and becoming stag head in places.

**Figure 7: Crown decline of the Oak and major deadwood viewed from the North**



There is a good level of epicormic growth on the lower trunk (Figure 8) and this is also rafting along some of the lower branches. The epicormic growth should be retained to aid with the overall health and condition of the tree.

**Figure 8: Epicormic growth on the main trunk**

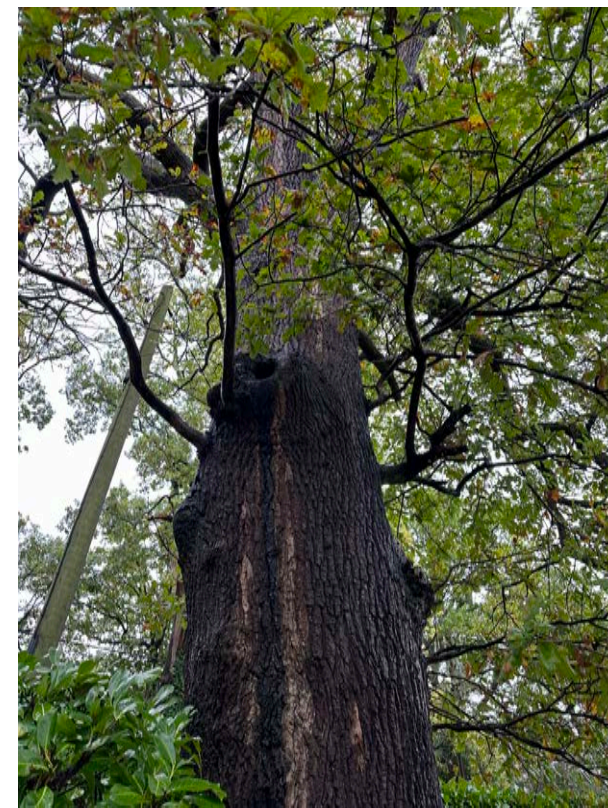


Given the location of the tree adjacent to the driveway, there is a high potential for previous root damage including soil compaction which may be a factor in the recent decline in conjunction with the warmer summers and low rainfall causing more stress on the trees ability to function and impeding roots access to available soil moisture.

There is also potential for internal decay and dysfunctional heartwood with some decayed wood visible at the old lower bark wounds especially to the North on the trunk and the trunk in places sounded hollow when tapped with a rubber mallet.

The crown has also historically been crown lifted to remove larger lower branches to the North, East and West but most of these wounds have occluded over fully now (Figure 9).

**Figure 9: Multiple occluded old pruning wounds on lower trunk and an open wet cavity**



## 6 Recommendations

The tree works recommendations for the Oak tree were discussed on-site with the Client and are for reasons of health and safety given the high target area surrounding the Oak tree.

The recommendations include the removal of the major dead wood ie dead wood over 50mm in diameter throughout the crown. Particularly in relation to the dead branch over the main driveway entrance to both property locations which is recommended to be reduced as part of the overall crown reduction works back to just beyond the live epicormic growth.

The overall crown which is in decline is recommended for a maximum of a 2 metre reduction but based on specific branches being reduced by 1 to 2 metres as per the following specification.

Crown reduction - North - reduce all limbs to the North back by 1 metre to suitable growth points (Figure 10).

East - dead limb over driveway entrance and road to reduce back to 1-metre branch stub beyond the epicormic growth and fork of the main limb. (Figure 11).

East - limb over the road to reduce back by 2 metres in both sections after the fork back to suitable growth points (Figure 12).

South - upper limbs over the road to reduce by 1-2 metres back to suitable growth points (Figure 12).

South West lowest limb running parallel to the hedge in the front garden - reduce end weight and reduce back by 1 metre to suitable growth points (Figure 12).

South West the second lowest limb to reduce back by 1 metre, Figures 12 and 13.

West - limbs over the driveway to reduce back by up to 2 metres to suitable growth points (Figures 10 and 13).

Overall height reduction down by up to 2 metres to suitable growth points leaving a 22-metre top height (Figures 10, 12 and 13).

It is also recommended that appropriate wildlife checks are carried out for bats and nesting birds of cavities and holes within the crown and branches prior to commencing any tree work.

Another recommendation is to provide the Oak tree with a nutrient stimulant or feed (Figure 14 )throughout the summer months weekly with a 20-millilitre solution of organic liquid seaweed fertiliser diluted in 10 litres (2 gallons) of water evenly dispersed around the rooting area of the tree on a weekly basis.

All the tree works should be carried out in accordance with BS3998:2010 Tree Works Recommendations and it is advised that at least three quotations are obtained for the recommended tree works, further guidance can be found in Appendix D.

A tree works application will be required to be submitted to Eastleigh Borough Council to obtain consent for the tree works due to the presence of the tree preservation order prior to carrying out the works.

Figure 10: Crown reduction to Northern branches and West



Figure 11: Dead limb reduction to the East over the driveway

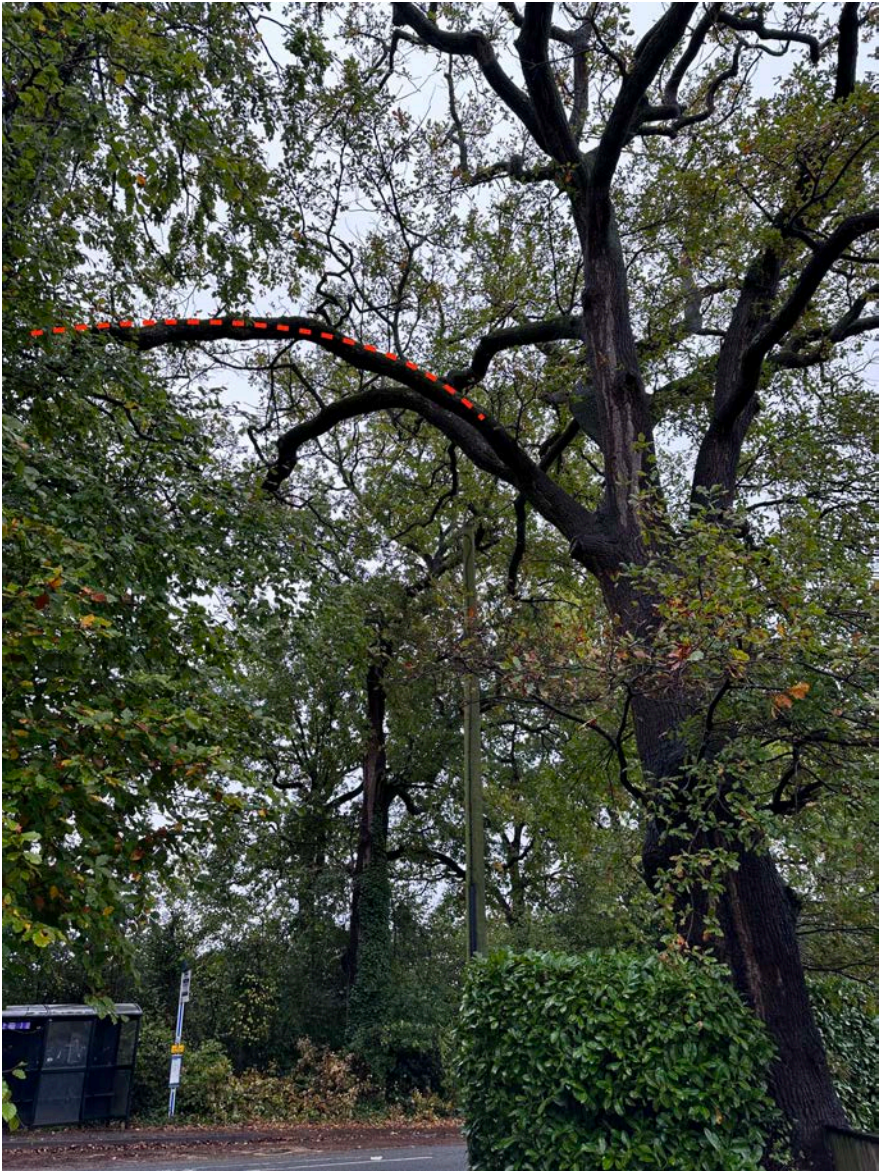
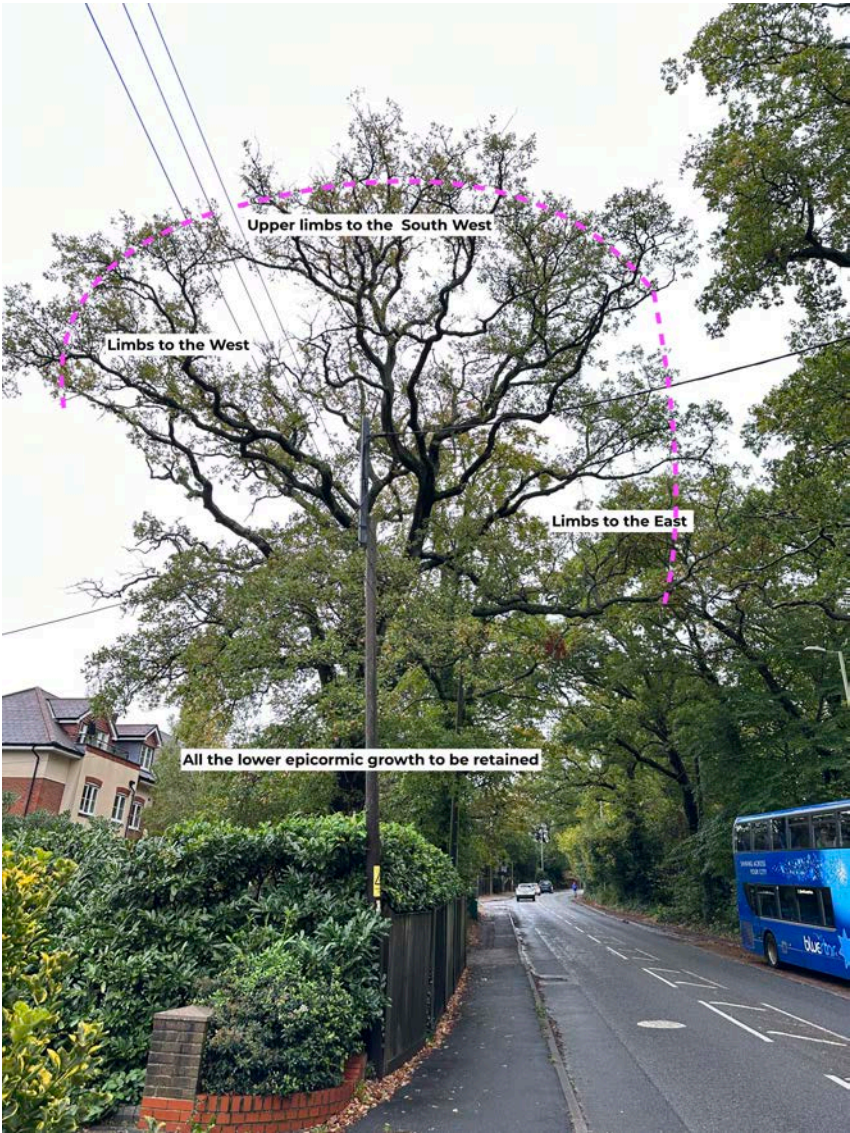


Figure 12: East, South and South West limbs for limb reduction works



Figure 13: Branch reduction works to the West of the crown over the driveway and parking and overall crown shape



**Figure 14: Liquid nutrient stimulant**



The initial reduction will aid in reducing the risk of branch failure or loss through shedding and will encourage further production of epicormic growth and back budding. Further branch reductions may be required every 3 to 5 years subject to the Oak tree's response to the initial crown and branch reduction works. Any future works would also require a tree works application to be submitted and consent obtained for the works proposed.

The final recommendation would be to monitor annually the health and condition of the Oak tree post-crown reduction works to assess the level of recovery post-works as well as any need for further future branch or crown reduction work to aid with retrenching of the crown to form a more compact crown over time.

## **7 Conclusions**

The Oak tree does exhibit some early signs of decline and the potential for internal decay to be present within the lower trunk. It is in decline with dieback symptoms within the crown and major dead wood present over fixed targets.

The tree works recommended will address the immediate health and safety concerns but aid with the retention of the Oak tree long term starting it in a tree management programme of potential future branch reduction works depending on the response to the initial tree works.

The information contained within this report is based on a visual assessment of the mature Oak from ground level. No invasive techniques were used at the time of the assessment and observations were made using hand tools including binoculars, girthing tape, a camera and a rubber mallet.

The data recorded is to provide an assessment at the time of the Oak tree and its condition. It is not intended to be used to verify the long-term health and safety of the tree but to provide management recommendations to maintain the tree in a healthy manner.

It is advised that the Oak tree is annually inspected to monitor the overall health of the tree and look for signs of improvement following the completed recommendations. It is further advised that tree owners observe their trees throughout the year and annually keep a photographic record of the trees to record any changes in their health over time. For further guidance see the general guidance for tree owners in Appendix C.

If any obvious signs of further decline appear or any changes to the area around the Oak tree, then they should contact an arboriculturist for further advice at that time.

## 8 Bibliography

### Key legislation

- Town and Country Planning Acts 1990 (Planning consents / Tree Preservation Orders (TPO) and Conservation Areas (CA))
- Forestry Act 1967 (Felling licences)
- Highways Act 1980
- Wildlife and Countryside Act 1981 (European Protected species / Red data lists / Sites of Special Scientific Interest (SSSI))
- Countryside and Rights of Way Act 2000 (CROW)
- Hedgerow Regulations 1997
- Health and Safety at Work Act etc 1974 (HSAWA) and associated regulations for health and safety
- Owners and Occupiers' Liability Acts 1957 and 1984 (These Acts set out the duties owed by occupiers to visitors and non-visitors. The 1957 Act provides that an occupier of premises owes a duty of care to visitors. Under the 1984 Act, an occupier owes a lesser duty to non-visitors ("trespasser duty"). Under both Acts, the occupier is required to take reasonable steps to discharge the duty owed, especially regarding obvious potential dangers.)

### Technical references and guidance

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- Department of Transport (2005). Well maintained highways; code of practice for highway maintenance management
- Fay, N, Dowson, D & Helliwell, R (2005) Tree Surveys: A Guide to Good Practice. The Arboricultural Association
- Forbes-Laird, J (2009) Meripilus: A new perspective
- Forestry Commission (2007) Operation Guidance Booklet Tree Safety Management

- Health and Safety Executive (HSE), Sector Information Minute (SIM) 01/2007/05, Management of the risk from falling trees
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- Lonsdale, D (2000) Managing hazards from trees. A general guide. Forestry Commission, London
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- Matheny, N & Clark J (1994) A photographic guide to the evaluation of hazard trees in urban areas International Society of Arboriculture
- Mattheck, C (2007) Updated Field Guide for Visual Tree Assessment
- Mattheck, C (2007) Secret Design rules of Nature optimum shapes without computers
- Mattheck, C (2002) Tree Mechanics explained with sensitive words by Pauli the Bear
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- Mattheck, C & Kubler, H (1997) Wood- The Internal Optimization of Trees
- Mitchell, A (1974) A Field Guide to Trees of Britain and Northern Europe Collins Mynors, C (2002) The Law of trees, Forests & hedgerows, Sweet & Maxwell, London
- National Tree Safety Group (NTSG) Common sense risk management of trees Guidance on trees and public safety in the UK for owners, managers and advisers (2011) published by The Forestry Commission
- Strouts, R.G & Winter, T.G (2000) Diagnosis of ill-health in trees Forestry Commission

## **Relevant standards**

- British Standard 3998:2010 Tree work - Recommendations
- British Standard 5837:2012 Trees in relation to design, demolition and construction - Recommendations
- British Standard 8545:2014 Trees: from nursery to independence in the landscape - Recommendations

# **Appendix A**

## **Tree Survey and plan**

# Tree Survey of an Oak at 53 Winchester Road

Tree Survey report



**Seq No:** 1

**Site:** 53 Winchester Road

**Position:** front garden of 53 Winchester Road

**Species:** Quercus robur ( English Oak)

**Notes:** Eastleigh Borough Council TPO  
309-E 1 Oak tree









### Inspection Only: 03/11/2022

**Height:** 24.0 metres

**Age:** Mature

**Trunk:** 103 cm

**Spread:** 20.5 metres

**N:** 8.0

**S:** 12.0

### Visited By: Amelia Williams

**Vigour:** Low

**Condition:** Fair

**Failure:** Potentially

**Target:** Very High

**Impact:** Moderate

E: 12.0

W: 9.0

**Recommendations:** Remove dead wood (>50mm )  
Monitor (Annually)  
Crown reduction - North - reduce all limbs to the North back by 1 metre to suitable growth points  
East - dead limb over driveway entrance and road to reduce back to 1-metre branch stub beyond the epicormic growth and fork of the main limb  
East - limb over the road to reduce back by 2 m metres in both sections after the fork back to suitable growth points  
South - upper limbs over the road to reduce by 1-2 metres back to suitable growth points  
South West lowest limb running parallel to hedge in the front garden - reduce end weight and reduce back by 1 metre to suitable growth points  
South West the second lowest limb to reduce back by 1 metre  
West - limbs over the driveway to reduce back by up to 2 metres to suitable growth points  
Overall height reduction down by up to 2 metres to suitable growth points leaving a 22-metre height  
NB: bat check prior to tree works of cavities

**Features:** Building within falling distance  
Bus Stop  
Drain - in Road and across driveway entrance  
Fence within falling distance  
Footpath within falling distance  
Footpath under canopy  
Fence under canopy  
Garden  
Gate or entrance - 1.3 metres from driveway entrance  
Overhead services - through canopy  
Parking within falling distance  
Parking under canopy  
Road under canopy  
Road within falling distance  
Telephone pole - to East of main trunk in pavement  
Underground services

**Conditions:** Bark damage - around lower trunk on the main stem, old impact wounds causing loss of bark historically and occluding around edges to North West and West.  
Bat potential - old pruning wound open cavities, crevices and holes at branch ends or on the main stem  
Branch issues or observations - naturally starting to retrench

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Branch stubs present  
Cavity  
Cavities present - open wet and dry  
cavities from old pruning wounds  
on the main trunk  
Crown issues or observations  
Compacted roots - driveway and  
block paving to West and North,  
road to East and pavement  
Epicormic growth - Good dense  
epicormics on lower trunk and  
rafting along branches and to be  
retained  
Fungal fruiting bodies - on dead  
wood on dead branch stub on  
lower trunk to West around 3  
metres above ground level  
Major dead wood >50mm  
Multiple dead branches  
Minor dead wood <50mm  
Multiple old pruning wounds  
Occluded pruning wounds  
Occluding pruning wounds  
Previous tree works carried out -  
historically crown lift to remove  
larger lower branches to North,  
East and West. Most wounds now  
occluded over.  
Sparse crown  
Stem issues or observations -  
potential for internal decay and  
dysfunctional heartwood with  
some decayed wood visible at old

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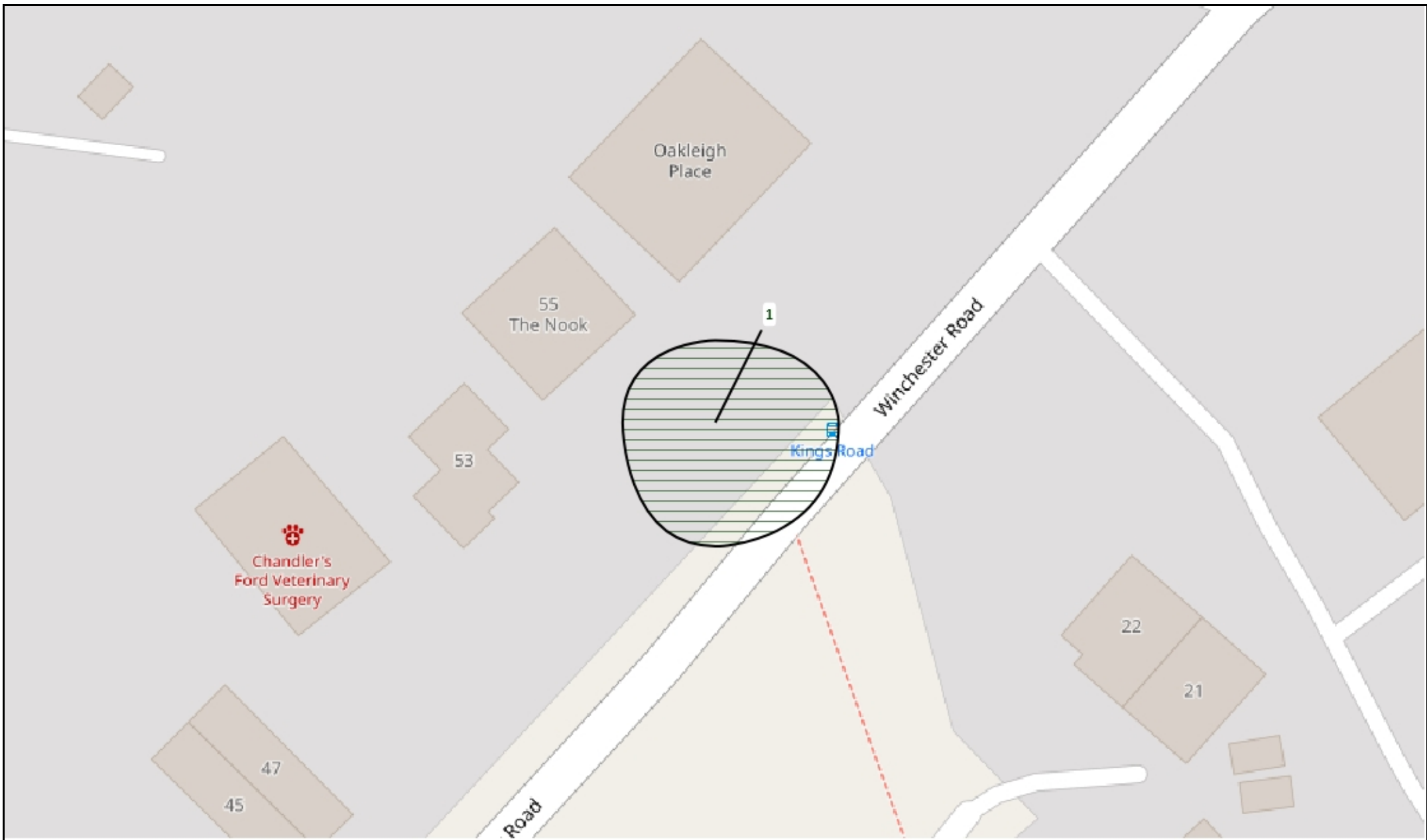
lower bark wounds especially to  
North and hollow sound when  
tapped  
Thin crown  
Thinning crown

**Priority:** Priority

**Risk:** Slight (192)

**Next Inspection:** 11/2023

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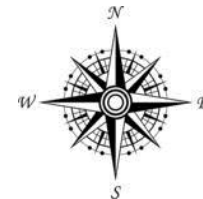
Overview

Scale

1: 286

Date

09/11/2022



## Appendix B

### Tree survey general guidance notes

The tree survey is a brief assessment of the trees at the time of the inspection from ground level for health and safety and to provide guidance on the short and long-term management of the tree stock within the site. It is not intended to be a guarantee of tree safety in any form, as trees are living changing dynamic organisms. Estimates for dimensions were used where access was restricted. General descriptive details were noted about trees including tree works recommendations. All the data gathered is recorded on a tablet using Ezytreev tree management software.

#### Full code

Each tree, group, hedge or woodland surveyed will be assigned a **reference number** which will relate to its location on a tree survey plan e.g. trees are a numerical number, groups have **G** at the start, hedges have **H**, and woodlands have **W**.

#### Sequence number

This is a user-defined sequence number applied to the tree survey order.

#### Species

Tree species will be in both **common name** and **botanical Latin** names.

#### Tree position and additional position

This is the reference location for where the tree is located within a site with additional information on the exact location.

The locations of the trees are also plotted against the mapping system on Ezytreev.

#### Height

The dimensions are taken using a clinometer or where this is not possible they will be estimated and are given in **metres**.

#### Spread

This is taken in **metres** as a diameter across the width of the whole canopy or calculated from the cardinal points based on pacing the distance on the ground.

#### Canopy spread

This is shown by measuring through pacing on the ground the **four cardinal points of a compass**, to achieve an accurate representation of the crown shape which will be recorded on the tree survey plan.

#### Trunk

Trunk/stem diameters are measured in **cm** at 1.5 metres above ground level for single-stemmed trees, or immediately above the root flare for multi-stemmed trees, using a specialist tape for converting the girth to diameter measurement. Where access to the stem is not feasible an estimate will be made.

#### No. of stems

The number of stems for a tree is recorded and also this relates to the number of trees or stems in a group, hedge or woodland.

## Notes

These are general features of the site or tree not recorded in a specific field.

## Age

An assessment of a tree's age classification is made in terms of its maturity within the site's landscape and recorded thus:

**Sapling / Young / Middle Aged / Mature / Over Mature / Veteran.**

## Vigour

Is an assessment of the annual growth of the tree and the categories are low, normal, and strong.

## Condition

An assessment of a tree's overall **condition** is to be made as **Good, Fair, Poor, or Dead.**

**Good** Generally in healthy condition and no structural defects observed

**Fair** Condition satisfactory with minor structural defects that could be remediated with pruning or tree shows adaptation

**Poor** Tree in decline, of poor structural form or of low health

**Dead** Not alive

## Site features

A description of the location of where the tree, group or woodland is situated.

## Tree conditions

Tree attributes and observations are key descriptions of the tree, group or woodland including defects, problems and previous tree works.

## Recommendations

Preliminary tree management recommendations are recommended based on the assessment of the tree and will have a **time scale** for when the works should be carried out or within a time period.

## Statutory designations

Prior to proceeding with any of the recommendations made within the tree survey, it is essential to carry out a check to see if any statutory designations apply. If the trees are within a Conservation Area or the subject of a Tree Preservation Order, the permission of the Local Authority will be required prior to carrying out any tree works.

Furthermore, if the works exceed 5 cubic metres in timber volume within one calendar quarter this may require a felling licence. In addition, it is important to note key ecological and wildlife considerations for example the potential for trees to be bat roots, or the nesting bird season and wildlife habit and only carry out works in the appropriate season unless the works are urgent.

## Priority

The timescale for carrying out any recommended works.

## Works due date

Date recommended works are due to be carried out by or within.

## Risk assessment

The basis of the risk assessment is THREATS - Tree Hazard Risk Evaluation and Treatment System developed by Julian Forbes-Laird.

## Failure score

Consideration of identified defects in relation to species / clone history, established failure criteria & time of year based on likelihood of failure rating of **None apparent (0) / Potentially with time (0.8) / Likely, foreseeable (2) / Probable, Soon (8) / Imminent, Immediate (50)**.

## Target score

Consideration of impact radius identified defect against potential targets. Consideration of forward visibility available to drivers (Poor Forward Visibility / Good Forward Visibility) & whether vehicles are likely to be stationary e.g at junctions. If targets liable to include unsupervised children &/or the elderly or infirm, upgrade target category by one category. For railway targets use THREATS NR. Target score based on **None (0) / Very low (7) / Low (15) / Medium (20) / High (25) / Very High (40)**.

## Impact score

Consideration of height of fall / momentum & whether e.g lower branches would impeded agent's descent based on degree of harm and consequence. Scores are outlined in the following list.

- 1** = Fragile objects destroyed, superficial or recoverable injury to pedestrians
- 4** = Minor damage, probable disabling, hospitalising injury to pedestrians
- 6** = Moderate structural severe vehicle damage, fatal disabling injuries likely
- 10** = Severe structural damage, vehicle crushed, passenger fatalities very probable.

## Risk evaluation

This is the total score from the **Failure score X Target score X Impact score** which then is put against one of the following scores ranges 0-49 / 50-159 / 160-329 / 330 - 999 / 1000-2000 / 2001 - 3999 / 4000+

## Risk / Threat category

This is based on where the score sits within the score ranges

- 0-49 = **1 - Insignificant** (Re-inspect within 5 years if general public access or 3 years if child specific access & TS>20)
- 50-159 = **2-Minimal** (Reinspect within 3 years if public access, schedule work as required)
- 160-329 = **3 - Slight** (Reinspect annually / after storms (Force 10+), expect to schedule work within 2 years)
- 330 - 999 = **4-Moderate** (Reinspect within 13 weeks, reinspect after SWE meantime (inc glad to Force 7+)
- 1000-2000 = **5 - Significant** (Arrange for work to be completed within four weeks maximum)
- 2001 - 3999 = **6-Serious** (Close site if practical; arrange for work to be completed within 7 days)
- 4000+ = **7 - Extreme** (Evacuate / prevent access to site, emergency call out of contractors).

**Timescale**

**Inspection frequency is** based on the outcome of risk and recommendations ie within a set time period of months, annually, 3 years and up to 5 years.

**Works already completed**

Where works recommended have been completed whilst on site.

**Next inspection date**

**The date for the next inspection is** scheduled per tree based on the assessment of requirements and risk factors.

**Photographs**

A photo where possible will be taken of each tree at the time of the tree survey or site visit including any additional photographs of specific defects.

**Ivy as a tree survey limitation on site**

Where ivy is present it is not possible at the time of the survey to fully assess the condition of the stem or stems and when ivy covers the tree the same applies. A follow-up re-inspection would be recommended following the severance or removal of ivy to enable a further assessment.

## **Appendix C**

### **Guidance for tree owners**

#### **Who has a duty of care for trees?**

Tree owners have a legal duty of care under the owner's liabilities for injury to others caused by the fall of a tree or branch. The formal duties come from the Occupiers Liability Acts of 1957 and 1984.

#### **What does this mean?**

It means that as a tree owner, it is important to understand how healthy your tree is and whether it poses any obvious defects that would be a risk to others and could cause them harm.

#### **Risk, hazards and defects**

The level of risk is relative to the number of people and the presence of valuable property that could be harmed or damaged in the event of root, branch or tree failure. The hazard is the potential to cause harm from a branch, trunk or crown failing structurally on a person or property causing injury or damage. Obvious defects would be those defects that pose risks only where there is a likelihood of harm.

#### **How do I tell the health of my tree?**

Initially, a quick visual check for obvious signs that the tree is likely looking healthy and stable is a good start and could be carried out by a tree owner.

If they then had any concerns then it would be worth getting it looked at by a person with working knowledge of trees and their defects to assess if it is unstable or requires action.

#### **What sorts of defects should I look out for?**

- Broken, snapped or hanging branches
- Dead branches or dead tree
- A lightning strike on the trunk
- Defoliation of leaves in summer
- Discolouration of leaves or wilting leaves
- Dark staining or patches on the bark
- Cavities or holes in the trunk or branches
- Leaning tree
- Root plate movement
- Fungal fruiting bodies
- Bark damage
- Swellings or bulges on the trunk or branches
- Woodpecker activity on branches or the main trunk

#### **How often should I get my tree inspected?**

A tree owner should have their tree inspected by a qualified professional on a periodic basis. There is no set timescale but a tree owner should do what is reasonable and prudent as a landowner. It is recommended that trees are inspected at a minimum every 5 years and more frequently subject to the location and targets around the tree.

#### **Whom can I get to assess my tree for health and safety?**

- Tree surgeon / Arborist
- Arboriculturist
- Arboricultural Consultant

It is important to ensure that whomever you engage to inspect your tree has the appropriate competence, experience and knowledge including insurance, for more details visit [www.trees.org.uk](http://www.trees.org.uk) for further guidance

### **Can I have work done to my tree?**

You can carry out tree works to your tree as the tree owner but are advised to check for any legal protection on the tree prior to carrying out the works. Trees can be protected by nature of being within a Conservation Area or the subject of a Tree Preservation Order. Check first with your Local Authority to determine the status of any protection.

If you are looking to work on a few trees then review the requirements under a felling licence also, as you can coppice or fell up to 5 cubic metres per calendar quarter without a felling licence. It is also important to ensure that the timing of any tree works does not affect protected species, particularly nesting birds or bats so appropriate checks should be carried out for ecological purposes prior to the works commencing.

### **Tree management**

It is also worth considering the future of your tree as part of its management, as trees grow and can outgrow the available space if left unmanaged.

Consider setting your tree into a tree pruning regime if it is appropriate for the tree species and also ensure to get approval first if it is protected. Consider the ongoing costs of maintenance prior to this to ensure you can continue to fund the maintenance requirements.

### **Summary of tree management actions**

- Check your tree regularly and keep your own records which could include a photograph of your tree each year and in each season to keep a record of any changes
- Check your tree(s) after storms and periods of extreme weather including winds, dry or heat spells and take action if any changes or issues are observed.
- Have periodic tree inspections carried out by a competent tree person and retain the inspections
- Carry out a risk assessment to identify the risks, hazards and any obvious defects
- Commission more detailed tree inspections if any concerns arise out of your own observations by a suitably qualified and competent person
- Take action to address the risks, hazards and defects through tree work and proactive tree management

## Appendix D

### Engaging a tree work contractor

There are many terms used by companies offering tree works. The majority operate as 'Tree Surgeons', 'Arborists' or 'Arboriculturists'. All should be experienced to carry out works to a specification or advise on individual cases, many will provide written tree work specifications or surveys if required.

Before employing a tree work contractor, you should check that the trees are not covered by a Tree Preservation Order (TPO), Planning Condition or within a Conservation Area. If they are you will require written consent from the Local Planning Authority prior to carrying out any work. A reputable contractor will normally do this on your behalf if required although you must always check that this has been done before allowing work to proceed.

Also, it is important to check that you do not require a felling licence for the works and that the total timber volume to be removed is below 5 cubic metres within the calendar quarter for the period of tree works. Check with the tree contractor for confirmation of this prior to authorising any tree works.

To ensure that you select well-trained, experienced and competent Arborists to work on your trees the following should provide guidance to help you in your selection.

#### Step 1 A tree contractor should be

- **Insured** which includes Public Liability & Employers Liability of at least £5 million pounds

- **Qualified** i.e. they hold National Proficiency Test Council (NPTC) certificates for chainsaw use, tree climbing or machine use. Including tree knowledge demonstrated by them having National Certificates, Diplomas, NVQ or other qualifications
- **A Member of a trade association or professional organisation** such as the Arboricultural Association (AA) [www.trees.org.uk](http://www.trees.org.uk) or International Society of Arboriculture (ISA) [www.isa-arboriculture.org](http://www.isa-arboriculture.org). A list of approved tree contractors can be found on these websites.
- Be able to provide a **written quotation**
- Should be professional and presentable
- Work to a British Standard which should be BS3998:2010 Tree works -Recommendations
- Provide details of a referee who can show you some of their work

#### Step 2 What to ask for in a quote

Ask an Arborist for a quote, but consider the following points to ensure they provide you with a quote for what you require.

- What work do you want to be done and consider what is the end result you are looking for
- What trees do want to work on and by when
- Is the tree owned by yourself or a neighbour and have you got permission from your neighbour?
- Do you want dead wood from the tree removed or retained for wildlife
- Do you want the logs stacked on-site or taken away
- Do you want the debris chipped and taken away or left on site
- Do you want the stump treated or ground out or left in situ
- Are there any special requirements i.e. access restrictions or services to avoid

- Pre-book date for works so ask them when are they available to carry out the works
- Time proposed for the work i.e. how long will it take
- Are the trees protected and who will be responsible for obtaining permission

### **Step 3 Get a minimum of 3 quotes**

- This allows you choice
- You get to select the contractors and avoid 'door knockers'
- It also provides a good way of checking for competitive pricing
- The lowest may not necessarily be the cheapest in the long term
- Always get a written quote
- A chance to meet the Contractors and judge if they are reputable and professional in appearance

If in any doubt ask the contractor for examples of recently completed tree works so you can have a look at their work. Any reputable contractor should have nothing to hide and should be pleased to answer any queries you may have.

### **Step 4 What to look for in a quote**

- Look for references like BS3998 2010 Tree Work - Recommendations
- Quotes should have clear and full details of the work to be undertaken e.g. 15-20% Thinning
- A plan should be provided of which trees and where they are located
- Check whether VAT is included

- Have they included putting in a Tree works application or Conservation Area notification or obtaining a felling licence otherwise who will be responsible for obtaining the necessary permissions and observing any wildlife considerations?
- How are they proposing to dispose of the debris?
- Are there any additional charges to consider for example stump grinding?
- Is any special equipment proposed like a mobile elevated work platform (MEWP / tree shears)?
- Avoid quotes with terms like 'lopping and topping' as these are not standard arboricultural practices and the end result may be unsightly or even hazardous
- Copy of risk assessment or method statement to show what steps will be taken to protect you and your property
- Provide a timescale for works as to how long it may take and lead-in time and if this is not, then ask
- The quote should state clearly a price for all the works specified and if it is not clear ask for clarification
- Be aware that there may be a limit to the quote validity period

### **Step 5 Engaging the Tree Contractor of your choice**

Prior to engaging your chosen tree contractor, you can ask to see their qualifications and insurance if you want to check this first including a risk assessment.

A competent tree contractor should be able to demonstrate they have the required competency for the work to be carried out. Competent arborists will be able to show you their certificates or ID cards if requested. They should also be able to provide copies of their health and safety policies, method statements and environmental and wildlife policies.

## **Step 6 Consumer protection**

If problems arise you can get help and advice from industry bodies such as the Arboricultural Association (AA), the International Society of Arboriculture (ISA), the Institute of Chartered Foresters (ICF) or Trustmark.

## Appendix E

### Qualifications and experience

# MISS AMELIA WILLIAMS

MICFor, CEnv, MArborA, Dip Arb L6 (ABC) Cert Ed.F.E, Cert Arb L4 (ABC) BSc (Hons)

### **Arboricultural Consultant, Chartered Arboriculturist and Company Director**

Amelia is the Principal Arboricultural Consultant and Company Director of The Arboricultural Company which she founded in February 2020. She has over 20 years of experience in Arboriculture and has previously run her own tree consultancy company earlier in her career and has gained a wide range of knowledge and experience in all her previous roles. She is also an assessor for the Institute of Chartered Foresters (ICF) as well as an active member of various strategy task and finish groups of the ICF.

She holds the following accreditations, memberships and qualifications relevant to arboriculture:

### **Chartered status**

- Chartered Arboriculturist (MICFor)
- Chartered Environmentalist (CEnv)

### **Professional memberships**

- Professional member of the Institute of Chartered Foresters
- Professional member of the Arboricultural Association

### **Qualifications**

- BSc Degree in Geography and Environmental management (Royal Holloway University of London)
- Professional Diploma in Arboriculture (Royal Forestry Society) (Dip Arb L6)
- Technicians Certificate in Arboriculture (Arboricultural Association) (Dip Arb L4 ABC)
- Certificate in Arboriculture (Royal Forestry Society)
- Aspire To Excellence leadership and management training NCFE (Level 5) Certificate
- Safety, Health and Environmental Management (Institute of Occupational Safety and Health (IOSH))
- City and Guilds Certificate in Further Education Stage 3 (Level 4) (Cert Ed.F.E)

Before then she was the Arboricultural Officer for Test Valley Borough Council for over four years within Community and Leisure Services. She was responsible for the tree management of all trees and woodlands on council-owned land including reactive enquiries of around 700 per annum. The tree survey programme including visual tree assessments, health and safety monitoring with a recent focus on Ash dieback and Oak processionary moth and tree planting. She used Ezytreeev tree management software to enable the holistic tree management of around 21,000 assets equating to around 66,000 trees with an annual target of 6,000 assets on a resurvey programme. She was responsible for the delivery of all the tree works and the tree contractor management focusing on the health and safety of the delivery, with annual budget responsibility of around £400k for tree works and replacement tree planting.

Her role previously for ten years was the Pan Garrison Trees, Grounds and Gardens Manager for Aspire Defence Services Limited, managing their tree and woodland management and maintenance plus the grounds maintenance and garden service delivery across seven Garrisons on behalf of the Ministry of Defence.

The main focus of her role involved managing the £2.3 million evergreen contract for all three-service areas and ensuring that this was delivered in accordance with the specifications and service level agreements.

Prior to that, she was an Arboricultural Consultant based in Hampshire and Director of Amelia Williams Ltd alongside her role initially and prior to that the Director of Arborsphere Ltd since 2007.

Prior to starting her first company, she was working as a Senior Consultant for CBA trees in Twyford in Hampshire from 2004 to 2007 assessing a wide range of arboricultural issues for projects across the UK and reaching Associate level partnership. The main focus related to carrying out tree surveys in accordance with BS5837:2005 and development sites.

Before becoming an Arboricultural Consultant she was a Lecturer in Arboriculture at Moulton College in Northampton for two years teaching both the theory and practical of the RFS Certificate in Arboriculture, the Higher National Diploma in Urban Forestry, National Diploma and National Certificate in Arboriculture and the National Diploma in Horticulture.

Amelia started her arboricultural career in 2000 as a Tree Surveyor / Tree Officer for Test Valley Borough Council where she undertook the task of reviewing the status of all Tree Preservation Orders, including converting the paper-based system to that of a computerised system on a GIS package. She also designed the access database to manage existing and new Tree Preservation Orders.

## **Range of arboricultural specialisms**

- Arboricultural consultancy
- Tree management for small (single tree) up to large tree collections (over 40,000 trees)
- Tree survey work (street trees, development projects, individual private sites)
- Tree Inspections and hazard risk assessments including health and safety issues around risk management
- Tree contract management and tree work compliance monitoring
- Tree Preservation Order advice and trees in Conservation Areas
- Arboricultural constraints and implications assessments and method statements
- Arboricultural site and project management including arboricultural supervision
- Arboricultural design including tree planting projects on both small and large scale
- Leadership and management including running own consultancy business
- Arboricultural Lectures and Presentations and general training and guidance

## **Contact details**

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